Atty Kruthers, Heather (for Public Administrator)

Atty Rackley, Doris Elaine (Pro Per)
Status Hearing

DOD:	DOD: 10-7-06	
Cont. 02211	from 111513, 4	
Af	ff.Sub.Wit.	
V	erified	
In	ventory	
PT	C	
N <sub>0</sub>	ot.Cred.	
N	otice of	
Hr		
Af	ff.Mail	
Af	ff.Pub.	
	o.Ntc.	
Pe	ers.Serv.	
	onf.	
	reen	
_	etters	
-	uties/Supp	
	bjections	
1 1	ideo	
	eceipt	
	l Report	
-	202	
	rder	
	ff. Posting	
	atus Rpt	
	CCJEA itation	
	B Notice	
1 1''	D ITOIICE	

**DORIS ELAINE RACKLEY**, Sister, was appointed Administrator with Full IAEA without bond and Letters issued on 8-28-07.

**On 11-15-13**, the Court removed Doris Rackley and appointed the **PUBLIC ADMINISTRATOR**.

**Public Administrator's Status Report filed 2-20-14 states** the sole asset of this estate is a 1/3 interest in the decedent's deceased father's real property. A final I&A will be sent to the probate referee soon. Brian Rackley, who resides in the home, has expressed an interest in purchasing it; therefore, the Public Administrator is working on meeting with the parties to discuss the necessary steps. Public Administrator requests the next hearing be set no sooner than four (4) months out.

**Public Administrator's Status Report filed 6-10-14 states** the final I&A has now been filed. A relative who lives on the real property, Brian Rackley, expressed an interest in purchasing the property; however, Senior Probate Assistant Susan Banuelos has been unable to set up a meeting with the family. She has arranged to meet with Mr. Rackley on June 16 to provide figures of fees to be paid, and consent will be required from the other family members.

It is respectfully requested that the next hearing be set no sooner than four (4) months out so that Mr. Rackley can ascertain if he will be able to pay the fees and purchase the property. Once the Public Administrator knows if this can go forward, the final account can be prepared.

NEEDS/PROBLEMS/COMMENTS:

Note: This decedent is an heir to related estate at Page 2. It appears that this decedent's 1/3 interest in the real property has not yet been distributed to this estate from the Estate of Herbert C. Hamby 07CEPR000788, which is the current owner of 100% interest in the property.

1. Need petition for final distribution.

Note: The Decedent Irene Hamby's will devises her estate to her nephews Brian Rackley and Kevin Rackly.

Reviewed by: skc
Reviewed on: 6-11-14
Updates:
Recommendation:
File 1 – Hamby

Atty Kruthers, Heather (for Public Administrator)

Atty Rackley, Elaine (Pro Per Administrator with Will Annexed)

Probate Status Hearing for Failure to File a First Account or Petition for Final Distribution

DOD: 9-6-05	DORIS ELAINE RACKLEY, Daughter, was	NEEDS/PROBLEMS/COMMENTS:
	appointed as Administrator with Will	
	Annexed with Limited IAEA without bond	Need petition for final distribution.
	and Letters issued on 8-28-07.	Note: The beneficiaries of the estate
Cont. from 092013,		are the decedent's three daughters:
111513, 022114	On 11-15-13, the Court removed Ms.  Rackley and appointed the PUBLIC	Elaine Rackley, Marilyn Hamby, and
Aff.Sub.Wit.	ADMINISTRATOR.	Irene Hamby. However, Irene Hamby
Verified	ADMINISTRATOR.	is now deceased. See Page 1 (related case 07CEPR00763).
Inventory	Public Administrator's Status Report filed 6-	Save 6: Save 1100: 88).
PTC	<b>10-14 states</b> the sole asset of this estate is	
	real property. A relative who lives on the	
Not.Cred.	real property, Brian Rackley, expressed an	
Notice of	interest in purchasing the property;	
Hrg	however, Senior Probate Assistant Susan	
Aff.Mail	Banuelos has been unable to set up a meeting with the family. She has arranged	
Aff.Pub.	to meet with Mr. Rackley on June 16 to	
Sp.Ntc.	provide figures of fees to be paid, and	
Pers.Serv.	consent will be required from the other	
Conf.	family members.	
Screen		
Letters	It is respectfully requested that the next	
Duties/Supp	hearing be set no sooner than four (4)	
Objections	months out so that Mr. Rackley can ascertain if he will be able to pay the fees	
Video	and purchase the property. Once the	
Receipt	Public Administrator knows if this can go	
CI Report	forward, the final account can be	
9202	prepared.	
Order		
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed on: 6-11-14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 2 – Hamby

3

Bortolussi, Anton (of Caswell, Bell & Hillison) (for Joann Soria – Successor personal representative)

Probate Status Hearing for Failure to File a Second Account or Petition for Final Distribution

DOD: 10/01/08
Cont. from 110113,
012314, 022814
Aff.Sub.Wit.
Verified
Inventory
PTC
Not.Cred.
Notice of
Hrg
Aff.Mail
Aff.Pub.
Sp.Ntc.
Pers.Serv.
Conf.
Screen
Letters
Duties/Supp
Objections
Video
Receipt
CI Report
9202
Order
Aff. Posting
Status Rpt
UCCJEA
Citation
FTB Notice

JACK LUCCHESI, son, was appointed Executor without bond on 12/16/08 and Letters Testamentary were issued on 12/17/08.

On 09/23/10, **Jack Lucchesi** resigned as Executor.

On 11/10/10, **JOANN SORIA**, daughter, was appointed as Administrator with Will Annexed without bond and Letters of Administration were issued to her on 11/10/10.

The First and Final Account and Report of Former Personal Representative, Petition for Settlement, and for Waiver of Commission was filed 12/28/10 and the Order Settling First and Final Account and Report of Former Personal Representative, Petition for Settlement, and for Waiver of Commission, was filed 05/25/11.

Notice of Status Hearing filed 08/30/13 set this matter for hearing regarding Status of the Second Account and/or Petition for Final Distribution on 11/01/13. Clerk's Certificate of Mailing states that a copy of the Notice of Status Hearing was mailed to Edward L. Fanucchi on 08/30/13.

Status Report filed on 6/11/14 states current attorney was substituted by prior attorney Edward Fanucchi due to a disagreement in the language describing a certain piece of real property in the estate. An updated appraisal was conducted to accurately reflect the property interest. The first and final report and petition for settlement is in the process of being prepared and should be filed by the end of next week. Mr. Fanucchi filed a lien against the estate for attorney's fees and costs incurred prior to the Substitution of Attorney was executed, Administratrix disagrees with the claimed fees and has filed a separate objections discussing why she believes such fees are inappropriate.

## NEEDS/PROBLEMS/COMMENTS:

Continued from 4/25/14. As of 06/11/14, the following issue remains:

1. Need first account, petition for final distribution.

**Note:** Substitution of Attorney filed on substituting attorney Anton M. Bortolussi in place of attorney Edward Fanucchi.

Note: Attorney Fanucchi has filed a Notice of Lien in this estate for his attorney's fees and costs. However, there has been no order made which grants him said fees. The Administrator filed objections to the lien. The issue of fees is not currently before the court. If the parties which to the court make a ruling on the attorney fees they should file the proper paperwork, notice all interested parties and pay the appropriate filing fees.

Reviewed by: JF/KT
Reviewed on: 6/11/14
Updates:
Recommendation:
File 6 – Lucchesi

# 4 Gloria Darlene Lucchesi (Estate)

Case No. 10CEPR00878

Atty Bortolussi, Anton (of Caswell, Bell & Hillison) (for Administrator Joann Soria)

Probate Status Hearing Re: Failure to File a First Account or Petition for Final Distribution

DOD: 4/23/10	JoANN SORIA was appointed as	NEEDS/PROBLEMS/COMMENTS:
, 13, 13	Administrator, with full IAEA authority	1, 2 2
	and without bond, on 11/8/2010.	
	=	2. Need first account, petition for
0 11 2255	Letters issued on 11/8/2010.	final distribution.
Cont. from 011714,		
022814, 042514	Inventory and Appraisal was due March	
Aff.Sub.Wit.	2011.	
Verified	TI D	
Inventory	The Department of Health Services filed	Note: Culpatitution of Attornay filed
PTC	a creditor's claim on 12/12/12 in the	Note: Substitution of Attorney filed on 5/15/14 substituting attorney
Not.Cred.	amount of \$74,720.18.	Anton M. Bortolussi in place of
Notice of	First Account or Petition for Final	attorney Edward Fanucchi.
Hrg	Distribution was due December 2011.	arronney Lawara ranocerii.
Aff.Mail		
Aff.Pub.	Notice of Status Hearing was mailed to	
Sp.Ntc.	attorney Edward Fanucchi and to	
Pers.Serv.	Administrator JoAnn Soria on	
	11/18/2013.	
Conf. Screen	Inventory and Appreciast file date 2/11/14	
	Inventory and Appraisal filed on 3/11/14	
Letters	showing the estate4 valued at \$100,000.00.	
Duties/Supp	<b>4</b> 100,000.00.	
<b>Objections</b>	Status Report filed on 6/11/14 states	
Video	current attorney was substituted by prior	
Receipt	attorney Edward Fanucchi due to a	
CI Report	disagreement in the language	
9202	describing a certain piece of real	
Order	property in the estate. An updated	
Aff. Posting	appraisal was conducted to accurately	Reviewed by: KT
Status Rpt	reflect the property interest. The first	Reviewed on: 6/11/14
UCCJEA	and final report and petition for settlement is in the process of being	Updates:
Citation	prepared and should be filed by the	Recommendation:
FTB Notice	end of next week.	File 4 – Lucchesi
	STOR STREAM	
		<b>A</b>

# 5A Natalie Jean Gomes (Estate)

Case No. 13CEPR00438

Atty Atty Boyajian, Thomas M., sole practitioner (for Petitioner Carl John Peterson, former spouse) Shahbazian, Steven L., sole practitioner (for Objector Kimbra Pannett, daughter)

Second Amended Petition for Probate of Lost Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

and first named Executor without bond, is Petitioner.  Full IAEA – o.k.  Cont. from 070213, 082013, 100813, 102913, 052714  ✓ Aff.Sub.Wit.  Verified  Estimated value of the Estate: Personal property - \$434,000.0 PTC  Not.Cred.  Notice of			Authorization to Administer Under IA	
bond, is Petitioner.  Full IAEA – o.k.  Lost Will dated: 06/19/2012  Residence: Clovis Publication: The Business Journal  Verified  Inventory PTC  Not.Cred.  Not.Cred.  Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf. Screen  Letters  Video Receipt  CI Report  9202  V Order  bond, is Petitioner.  Full IAEA – o.k.  Lost Will dated: 06/19/2012  Residence: Clovis Publication: The Business Journal  Estimated value of the Estate: Personal property - \$434,000.0  Real property - \$325,000.0  Probate Referee: Steven Diebert  Video Receipt  CI Report  9202  Vorder	DOD: 2/21/2013		CARL JOHN PETERSON, former spouse	
Conf. from 070213, 082013, 100813, 102913, 052714  Vaff.Sub.Wif.  Verified  Inventory  PTC  Not.Cred.  Notice of Hrg  Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf. Screen  Letters X  Duties/Supp  Video Receipt  CI Report  9202  Vorder  Full IAEA – o.k.  Lost Will dated: 06/19/2012  Residence: Clovis  Publication: The Business Journal  Estimated value of the Estate:  Personal property - \$434,000.0  Real property - \$325,000.0  Total: - \$759,000.0  Probate Referee: Steven Diebert  Video Receipt  CI Report  9202  Vorder			and first named Executor without	
Cont. from 070213, 082013, 100813, 102913, 052714  / Aff.Sub.Wit.			bond, is Petitioner.	
D82013, 100813, 102913, 052714			Full IAEA – o.k.	
Notice of Hrg   Hrg   Hrg   Aff. Mail   W/O   Aff. Pub.     Sp.Ntc.   Pers. Serv.   Conf. Screen   Letters   X   ✓ Duties/Supp   ✓ Objections   Video Receipt   CI Report   9202   ✓ Order   Aff. Posting   Status Rpt   UCCJEA   Residence: Clovis   Publication: The Business Journal   Publication: The Business Journal		3,	<b>Lost Will dated</b> : 06/19/2012	
✓ Aff.Sub.Wit. ✓ Verified   Inventory PTC   Not.Cred. ✓ Real property - \$434,000.0   ✓ Notice of Hrg Frobate Referee: Steven Diebert   ✓ Aff.Pub. Probate Referee: Steven Diebert   Sp.Ntc. Pers.Serv.   Conf. Screen   Letters X   ✓ Objections Video Receipt   CI Report 9202   ✓ Order				
Verified  Inventory  PTC  Not.Cred.  ✓ Notice of Hrg  ✓ Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf. Screen  Letters X  ✓ Duties/Supp  ✓ Objections  Video Receipt  CI Report  9202  ✓ Order  Estimated value of the Estate: Personal property - \$434,000.0 Real property - \$325,000.0 Probate Referee: Steven Diebert  Probate Referee: Steven Diebert  Conf. Screen  Letters X  ✓ Duties/Supp  ✓ Objections				
Inventory   Estimated value of the Estate:	✓ Aff.Sub.Wit.		Publication: The Business Journal	
PTC   S325,000.0     Not.Cred.   Total: - \$759,000.0     Value of Hrg	✓ Verified		Estimated value of the Estate:	
Not.Cred.	Inventory		Personal property - \$434,000.00	
Notice of Hrg  Aff. Mail  Aff. Pub.  Sp. Ntc.  Pers. Serv.  Conf. Screen  Letters  Video Receipt  CI Report  9202  Order  Aff. Posting  Status Rpt  UCCJEA	PTC		Real property - \$325,000.00	
Hrg  ✓ Aff.Mail  ✓ Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf. Screen  Letters  ✓ Duties/Supp  ✓ Objections  Video Receipt  CI Report  9202  ✓ Order  Aff. Posting  Status Rpt  UCCJEA	Not.Cred.		Total: - \$759,000.00	
✓ Aff.Mail ✓ Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters ✓ Duties/Supp ✓ Objections Video Receipt CI Report 9202 ✓ Order Aff. Posting Status Rpt UCCJEA	<b>V</b>		Probate Referee: Steven Diebert	
Sp.Ntc.  Pers.Serv.  Conf. Screen  Letters X  ✓ Duties/Supp  ✓ Objections  Video Receipt  CI Report  9202  ✓ Order  Aff. Posting Status Rpt UCCJEA	A ( A A . 'I	W/O		
Pers.Serv.  Conf. Screen  Letters X  Duties/Supp  Video Receipt  CI Report  9202  Order  Aff. Posting  Status Rpt  UCCJEA	✓ Aff.Pub.			
Conf. Screen  Letters X  ✓ Duties/Supp  ✓ Objections  Video Receipt  CI Report  9202  ✓ Order  Aff. Posting  Status Rpt  UCCJEA	Sp.Ntc.			
Screen  Letters X  ✓ Duties/Supp  ✓ Objections  Video Receipt  CI Report  9202  ✓ Order  Aff. Posting  Status Rpt  UCCJEA	Pers.Serv.			
Letters X  ✓ Duties/Supp  ✓ Objections  Video Receipt  CI Report  9202  ✓ Order  Aff. Posting  Status Rpt  UCCJEA	Conf.			
<ul> <li>✓ Duties/Supp</li> <li>✓ Objections</li> <li>Video         Receipt</li> <li>CI Report</li> <li>9202</li> <li>✓ Order</li> <li>Aff. Posting</li> <li>Status Rpt</li> <li>UCCJEA</li> </ul>	Screen			
✓ Objections  Video Receipt  CI Report  9202  ✓ Order  Aff. Posting  Status Rpt  UCCJEA	Letters	Χ		
Video Receipt  CI Report  9202  ✓ Order  Aff. Posting  Status Rpt  UCCJEA	✓ Duties/Supp			
Receipt CI Report 9202  Order  Aff. Posting Status Rpt UCCJEA	√ Objections			
CI Report 9202  ✓ Order  Aff. Posting Status Rpt UCCJEA	Video			
9202  V Order  Aff. Posting  Status Rpt  UCCJEA	Receipt			
✓ Order  Aff. Posting Status Rpt UCCJEA	CI Report			
Aff. Posting Status Rpt UCCJEA	9202			
Status Rpt UCCJEA	✓ Order			
Status Rpt UCCJEA				
Status Rpt UCCJEA	A# Dooking			
UCCJEA		<del>                                     </del>		
<del> </del>		<del>                                     </del>		
Citation		<u> </u>		
FTD N. P	Citation	<u> </u>		

FTB Notice

# NEEDS/PROBLEMS/COMMENTS:

#### Continued from 5/27/2014.

Note: Petitioner Carl Peterson is a resident of South Dakota per the Confidential Supplement to Duties and Liabilities filed 5/16/2014. The Court may require bond if the proposed personal representative resides outside California or for other good cause, even if the will waives bond, pursuant to California Rule of Court 7.201 (b) and Probate Code § 8571. Court may require bond to be posted, or waivers of bond to be filed with the Court from the beneficiaries in support of Carl Peterson's request to be appointed as Executor of Decedent's lost Will without bond.

- Proof of Service by Mail of the Notice of Hearing filed on 6/9/2014 shows notice to KIMBRA PANNETT was made C/O Attorney Steven Shahbazian. Pursuant to CA Rule of Court 7.51(2), notice mailed to a person in care of another person is insufficient unless the person entitled to notice is an adult and has directed the party giving notice in writing to send the notice in care of the second person. Court may require direct notice to be served to KIMBRA PANNETT.
- Need proposed letters indicating that Petitioner will be appointed as Executor of Decedent's lost Will.

### ~Please see additional page~

Reviewed by: LEG
Reviewed on: 6/12/14
Updates:
Recommendation:
File 5A – Gomes

# Additional Page 5A, Natalie Jean Gomes (Estate)

#### Case No. 13CEPR00438

### NEEDS/PROBLEMS/COMMENTS, continued:

Note for background: Declaration of Waiver of Bond was filed 12/12/2013 with specific reference to waiver of bond for the Special Administrator, CARL PETERSON, by the following persons: Cynthia Wallert; Matthew Peterson; Tambra Peterson; John Torres; Florinda Torres; Kimbra Pannett. Petitioner Carl Peterson was appointed Special Administrator with limited authority and no bond on 12/12/2013, per Order for Probate filed 12/18/2013. Letters issued 1/15/2014, and expired 2/18/2014. Powers granted include in part: payment of bills such as house insurance, utilities, alarm, taxes, yard care on real property; payment of car insurance.

**Note Re Proposed Order:** Proposed order contains Attachment 2c stating the provisions of the lost Will as required by Probate Code § 8223. Attachment 2c omits the statement in the Will regarding bond; therefore, Attachment 2c has been interlineated to indicate that "No bond shall be required for any person named as executor." It should be noted, however, that while the order admitting the lost Will to probate will contain this statement regarding bond not required, the Court may nonetheless require bond to be posted by the non-resident Executor pursuant to California Rule of Court 7.201 (b) and Probate Code § 8571.

Note: If Petition is granted, Court will set status hearings as follows:

- Thursday, July 17, 2014 at 9:00 a.m. in Dept. 303 for filing of proof of bond, if Court requires posting of bond.
- Thursday, October 30, 2014 at 9:00 a.m. in Dept. 303 for filing of inventory and appraisal; and
- Tuesday, August 13, 2015 at 9:00 a.m. in Dept. 303 for filing of first account and/or petition for final distribution.

Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.

Atty Atty

**5B** 

Boyajian, Thomas M., sole practitioner (for Petitioner Carl John Peterson, former spouse) Shahbazian, Steven L., sole practitioner (for Objector Kimbra Pannett, daughter)

Status Hearing Re: Settlement Agreement

	Status nearing ke: Sement Agreement				
DC	D: 2/21/2013	CARL JOHN PETERSON, former spouse and first named Executor without	NEEDS/PROBLEMS/		
		bond, filed a Petition for Probate on 5/20/2013.	COMMENTS:		
		KIMBRA PANNETT, daughter, filed an Objection and Memorandum of	1 N = = = l		
		Kimbra Pannet to Decedent's Purported Will on 10/3/2013.	1. Need		
	ont. from	Nithara Tariherto Decedeni 31 diponed 1111 10/0/2010.	settlement		
		CARL JOHN PETERSON filed an Amended Petition for Probate on	agreement.		
	Aff.Sub.Wit.	10/21/2013.			
	Verified				
	Inventory	CARL JOHN PETERSON filed an Ex Parte Petition for Letters of Special			
	PTC	Administration with Limited IAEA Authority on 11/22/2013. Order for Probate filed 12/18/2013 appointed him as Special Administrator with			
	Not.Cred.	limited authority and no bond on 12/12/2013. Letters issued 1/15/2014,			
	Notice of	and <u>expired 2/18/2014</u> . Powers granted included in part: payment			
	Hrg	of bills such as house insurance, utilities, alarm, taxes, yard care on			
	Aff.Mail	real property; payment of car insurance.			
	Aff.Pub.	Minute Order dated 1/7/2014 from the hearing on the Amended			
	Sp.Ntc.	Petition for Probate set the matter for Settlement Conference on 4/14/2014,			
	Pers.Serv.	and for Court Trial on 5/6/2014.			
	Conf.	Minute Order dated 4/14/2014 from the Settlement Conference Re:			
	Screen	Disputed Claim set this matter for Status Hearing Re: Settlement			
	Letters	Agreement on 6/13/2014, and states:			
	Duties/Supp	Parties engage in settlement discussions with the Court. Parties			
	Objections	reach a resolution regarding the disputed claim as follows: parties			
	Video	agree that the estate will pay Kimbra Pannett \$75,000.00 as full			
	Receipt	and complete settlement of all claims. Payment to be made			
	CI Report	within 60 days. Parties further agree that the objections to the			
	9202	second amended petition will be withdrawn. Counsel is directed to set a date with the Clerk's Office for hearing on the second			
	Order	amended petition [date set is 5/27/2014.] Upon inquiry by the			
	Aff. Posting	Court, each party individually agrees to the terms and conditions	Reviewed by: LEG		
	Status Rpt	of the settlement. The Court accepts Mr. Peterson's representation	Reviewed on:		
	·	that Tambra Peterson is also in agreement with the resolution.	6/12/14		
	UCCJEA	Counsel is directed to prepare the agreement. The trial date of	Updates:		
	Citation	5/6/2014 is vacated. Matter is set for Status Hearing Re: Settlement	Recommendation:		
	FTB Notice	Agreement on 6/13/2014.	File 5B - Gomes		
<u> </u>		1			

**5B** 

Probate Status Hearing Re: Flling Inventory and Appraisal

Age:		NEEDS/PROBLEMS/COMMENTS:
DOD:		
	=	OFF CALENDAR. I & A filed on
		4/21/14.
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 6/11/14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 6 - Vaughn

6

Poochigian, Mark S (for Evelyn I Holm – Petitioner – Spouse)

Status Hearing Re: Filing of the Inventory and Appraisal

_	Status fleating ke. Filing of file inventory a	
DOD: 08/30/2012		NEEDS/PROBLEMS/COMMENTS:
		OFF CALENDAR INVENTORY
		OFF CALENDAR. INVENTORY
		AND APPRAISAL FILED
Cont. from 011414		<u>06/02/2014.</u>
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of	7	
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202	4	
Order	_	
Aff. Posting	_	Reviewed by: LV
Status Rpt	4	<b>Reviewed on:</b> 06/11/2014
UCCJEA	4	Updates:
Citation	-	Recommendation:
FTB Notice		File 7 – Bland

Probate Status Hearing Re: Filing of Bond

Age:		NEEDS/PROBLEMS/COMMENTS:
DOD:		
	7	OFF CALENDAR. Bond filed on
	7	5/14/14.
Cont. from	7	
Aff.Sub.Wit.	7	
Verified	7	
Inventory	7	
PTC	7	
Not.Cred.	7	
Notice of	7	
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.	7	
Screen	<u>_</u>	
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 6/11/14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 8 - Kermoyan

Carl Timothy Loveless (CONS/PE)
Kruthers, Heather H (for Conservator Public Guardian) Status Hearing Re: Filing of the Fifteenth Account

	PUBLIC GUARDIAN is successor	NEEDS/PROBLEMS/COMMENTS:
	Conservator.	3. Need fifteenth account <u>or</u> current
	The Fourteenth Account was approved on 7/18/12.	written status report pursuant to Local Rule 7.5 which states in all
Cont. from		matters set for status hearing
Aff.Sub.Wit.	Minute Order dated 7/18/12 set this status hearing for the filing of the	verified status reports must be
Verified	Fifteenth Account.	filed no later than 10 days before the hearing. Status Reports must
Inventory		comply with the applicable code
PTC		requirements. Notice of the status
Not.Cred.		hearing, together with a copy of
Notice of		the Status Report shall be served
Hrg		on all necessary parties.
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 6/11/14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 9 - Loveless

Selters, J. Benjamin, III (of Pomona, CA, for Successor Executor Marlin L. Heckman)
Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 1-19-09	MARLIN L. HECKMAN was appointed	NEEDS/PROBLEMS/COMMENTS:
	Executor with Full IAEA without bond on 1-15-14. Letters issued on 1-22-14.	Note: This estate was opened in 2009
	=	and an order for final distribution was
	At the hearing on 1-15-14, the Court set	entered on 1-4-10. The estate was
	this status hearing for the filing of the	reopened because it was discovered
Aff.Sub.Wit.	Inventory and Appraisal.	that a partial interest in real property
Verified		was still held in the decedent's
Inventory		name.
PTC		Need Inventory and Appraisal
Not.Cred.		pursuant to Probate Code §8800.
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.	1	
Screen		
Letters		
Duties/Supp	<u> </u>	
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed on: 6-11-14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 10 - Heckman

Status Hearing Re: Filing of the Fourth Account

Age:	NEEDS/PROBLEMS/COMMENTS:
DOD:	
	OFF CALENDAR. Fourth account
	was approved on 6/9/14
Cont. from	
Aff.Sub.Wit.	
Verified	
Inventory	
PTC	
Not.Cred.	
Notice of	
Hrg	
Aff.Mail	
Aff.Pub.	
Sp.Ntc.	
Pers.Serv.	
Conf.	
Screen	
Letters	
Duties/Supp	
Objections	
Video	
Receipt	
CI Report	
9202	
Order	
Aff. Posting	Reviewed by: KT
Status Rpt	Reviewed on: 6/11/14
UCCJEA	Updates:
Citation	Recommendation:
FTB Notice	File 11 - Silberstein

Wagner, Bryan N. (for Executor Henry T. Perea)
Probate Status Hearing Re: Filing First Account or Final Distribution

DOD: 5-18-12		HENRY T. PEREA, Son, was appointed	NEEDS/PROBLEMS/COMMENTS:
		Executor with Full EAEA without bond on	
Cont from 100413		8-2-12.	Need first account or petition for final distribution.
		On 8-2-12, the Court set this status hearing	•
	<u> </u>	for filing of the first account or petition for	
	Aff.Sub.Wit.	final distribution.	
	Verified	Final Inventory and Apprairal filed 11 12 10	
	Inventory	Final Inventory and Appraisal filed 11-13-12 reflected a total estate value of \$142,500.00	
	PTC	consisting of real property and a vehicle.	
	Not.Cred.		
	Notice of	Verified Status Report filed 6-3-14 states the	
	Hrg	vehicle was sold to the Executor for the	
	Aff.Mail	appraised value per Court order and	
	Aff.Pub.	proceeds deposited to an estate account.	
	Sp.Ntc.	The residence, valued at \$129,000 per the I&A, was subject to a lien of the Fresno	
	Pers.Serv.	County Federal Credit Union in the sum of	
	Conf.	\$13,000 and a lien of the Franchise Tax Board	
	Screen	in the amount of approx. \$9,000. The home	
	Letters	was sold in January 2014 for \$129,000, and	
	Duties/Supp	proceeds were paid to the Fresno County	
	Objections	Federal Credit Union to satisfy the first and	
	Video	second mortgages.	
	Receipt	The estate has numerous creditor's claims	
	CI Report	totaling \$50,026.36 including the claim by	
	9202	the Franchise Tax Board of approx. \$9,000	
	Order	and the IRS of approx. \$29,000.	
	Aff. Posting	The personal representative requests as	Reviewed by: skc
~	Status Rpt	The personal representative requests an additional three (3) months to complete the	Reviewed on: 6-11-14
	UCCJEA	final report and petition to close the estate.	Updates:
	Citation	interrepent and perment to close the obtate.	Recommendation:
	FTB Notice		File 12 – Trevino

DOD: 06/22/12	KAREN K. WILLIAMS, daughter, was	NEEDS/PROBLEMS/COMMENTS:
	appointed as Administrator with limited	
	IAEA and funds to be deposited into a	4. Need first account, petition for
	blocked account on 06/04/13. Letters	final distribution <u>or</u> current written
0 17 050014	of Administration were issued on	status report pursuant to Local
Cont. from: 052814	06/10/13.	Rule 7.5 which states in all matters
Aff.Sub.Wit.		set for status hearing verified
Verified	Inventory & Appraisal filed on 12/09/13	status reports must be filed no
Inventory	shows the estate valued at \$179,919.84	later than 10 days before the hearing. Status Reports must
PTC	Minute Order from hearing on 03/28/14	comply with the applicable code
Not.Cred.	set this matter for status regarding filing	requirements. Notice of the status
Notice of	the Accounting/Report of Administrator	hearing, together with a copy of
Hrg	and Petition for Final Distribution.	the Status Report shall be served
Aff.Mail		on all necessary parties.
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 6/11/14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 13 - Williams
		12

O'Grady, John E. (for Executor Aspen Bell)

DOD: 11/27/12	ASPEN BELL was appointed Executor	NEEDS/PROBLEMS/COMMENTS:
000: 11/27/12	with Full IAEA authority and with bond	NEEDS/TROBLEMS/COMMENTS.
	set at \$215,950.00 on 4/9/13.	5. Need first account, petition for
	301 α1 ψ210,730.00 011 <del>4</del> ,7710.	final distribution or current written
	Bond filed on 5/22/13.	status report pursuant to Local
Cont. from	Doria med en 3/22/10.	Rule 7.5 which states in all matters
Aff.Sub.Wit.	Letters issued on 5/22/13.	set for status hearing verified
Verified		status reports must be filed no
Inventory	I & A filed on 9/9/13 showing the estate valued at \$178,992.16.	later than 10 days before the hearing. Status Reports must
PTC		comply with the applicable code
Not.Cred.	Minute Order dated 4/9/13 set this	requirements. Notice of the status
Notice of	status hearing for the filing of the first	hearing, together with a copy of
Hrg	account or petition for final distribution.	the Status Report shall be served
Aff.Mail		on all necessary parties.
Aff.Pub.	7	
Sp.Ntc.		
Pers.Serv.		
Conf.	7	
Screen		
Letters		
Duties/Supp		
Objections		
Video	7	
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 6/11/14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice	1	File 14 - Gintz
		1.4

Fiske, William S

Age:	NEEDS/PROBLEMS/COMMENTS:
DOD:	
	OFF CALENDAR. Judgment of
	Final Distribution signed on 3/17/14.
Cont. from	•
Aff.Sub.Wit.	
Verified	
Inventory	
PTC	
Not.Cred.	
Notice of	
Hrg	
Aff.Mail	
Aff.Pub.	
Sp.Ntc.	
Pers.Serv.	
Conf.	
Screen	
Letters	
Duties/Supp	
Objections	
Video	
Receipt	
CI Report	
9202	
Order	
Aff. Posting	Reviewed by: KT
Status Rpt	Reviewed on: 6/11/14
UCCJEA	Updates:
Citation	Recommendation:
FTB Notice	File 15 - Meux

Fogderude, Eric K. (for Executor Stephen John Schroeter)

DOD: 10/24/12		STEPHEN JOHN SCHROETER was	NEEDS/PROBLEMS/COMMENTS:
	-,,	appointed Executor with Full IAEA	
-		authority and without bond on 4/11/13.	6. Need first account, petition for
<b> </b>		=	final distribution or current written
		Letters issued 4/11/14.	status report pursuant to Local
Cont. from			Rule 7.5 which states in all matters
	Aff.Sub.Wit.	Corrected I & A filed on 4/25/14 shows	set for status hearing verified
	Verified	the estate valued at \$247,494.38.	status reports must be filed no
	Inventory	Minute order dated 4/11/13 set this	later than 10 days before the hearing. Status Reports must
	PTC	status hearing for the filing of the first	comply with the applicable code
	Not.Cred.	account or petition for final distribution.	requirements. Notice of the status
	Notice of	7	hearing, together with a copy of
	Hrg		the Status Report shall be served
	Aff.Mail		on all necessary parties.
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf.		
	Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video		
	Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		Reviewed by: KT
	Status Rpt		Reviewed on: 6/11/14
	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 16 - Schroeter